



Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Required Report - public distribution

Date: 11/30/2001

GAIN Report #NL1081

The Netherlands

Retail Food Sector

Report

2001

Approved by:

Phil Letarte

U.S. Embassy, The Hague

Prepared by:

Wendalin Kolkman

Report Highlights:

Dutch eating habits are changing, with consumers demanding convenience products such as ready-to-eat-meals, prepacked fresh foods, more variety, and more specialty food items. Product quality is as important as taste and health characteristics. Also, sustainability, environmental and animal welfare play an increasingly important role in marketing. While consumer interest in organic food, functional food, Kosher food, Halal food, and private labels is growing, they are expected to remain niche markets.

Includes PSD changes: No
Includes Trade Matrix: No
Annual Report
The Hague [NL1], NL

Table of Contents

Summary	1
Section I. Market Summary	3
Demographic Characteristics	3
Economic Development	3
Transition to Euro Currency	5
Dutch Food Purchasing Attributes	6
Opportunities for U.S. Products	9
Food Safety Policy	9
The Netherlands Food Authority	9
Dutch Commodities Act	9
Improved GMO Labeling	10
Voluntary Functional Foods Code	10
CBL-BRC-code	10
EUREP-GAP	10
Global Food Safety Initiative	11
Section II. Road Map for Market Entry	12
Entry Strategy	12
Market Structure	13
Discounters	15
Ethnic Food Stores	16
Online Shopping	16
Private Labels	17
Company Profiles	18
Buying Procedures	20
Evaluating Importers	20
General profile of the Dutch Businessman/woman	21
Section III. Competition	21
Section IV. Best Products Prospects	22
Section V. Post Contact and Further Information	27
Annex 1.	28
Annex 2.	29
Annex 3.	30
Annex 4.	31

Summary

The Netherlands has a highly developed and competitive food market. The Dutch food retail sector is characterized by a high number of supermarkets with a relatively small floor-space. There are only a few “hypermarkets” or superstores. Large Dutch supermarket chains account for about 65 percent of total sales, while specialty stores, open air markets, department stores, convenience stores in gas station, etc., make up the balance. Specialty stores, like butchers, greengrocers and fishmongers, are losing market shares to supermarkets because of their lack of economies of scale. Although the market share of Dutch supermarket chains is growing, the classic supermarket is expected to evolve into a combination supermarket/catering service. Relatively new food retailers in the Dutch market are convenience stores in gas stations, food stores at railway stations and airports, and small convenience food retailers in the inner cities.

As a result of changing demographics and increased wealth, Dutch eating habits are changing, with consumers demanding convenience products such as ready-to-eat-meals, prepacked fresh foods, more variety, and more specialty food items. Product quality is as important as taste and health characteristics. Also, sustainability, environmental and animal welfare play an increasingly important role in marketing. While consumer interest in organic food, functional food, Kosher food, Halal food, and private labels is growing, they are expected to remain niche markets.

In 2000, total supermarket sales were US\$ 19.9 billion. The Dutch food retail industry is dominated by the world’s 4th largest food retail organization Ahold/Albert Heijn with a market share of 28 percent. Food retailer Ahold/Albert Heijn purchases food for its own Albert Heijn supermarket chain. Because of the relatively small market shares of some Dutch food retailers, many of them are members of large food buying groups to gain mass and synergies. In The Netherlands, food buying groups Laurus (26% market share), TSN (24%) and Superunie (12%) sell to various supermarket chains directly, or through wholesalers. Albert Heijn, Laurus, TSN and Superunie control 90 percent of the Dutch food retail market. It is forecast that in 10 years the majority of Dutch food products will be sold through international buying alliances, like AMS and Europartners.

Dutch food retail organizations (like Albert Heijn, Aldi, Lidl) and food buying groups (like Laurus, TSN, Superunie) almost never import food products directly because they are generally low volume, specialty products. Food retailers and food buying groups often refer U.S. exporters to Dutch specialty food importers, which already import for them and are better equipped to introduce U.S. products. A U.S. product will be of interest if it is innovative and is profitable. Most popular products are those which are new, have a higher than average trade margin, and have a promotional support plan.

The Netherlands has a large food production and processing industry, which employs about 17 percent of the population and contributes 6 percent of the gross domestic product. The food processing industry provides approximately 25 percent of total Dutch industrial output, of which about 50 percent is exported. The Dutch food processing industry is led by Unilever, the world’s 3rd largest food company. EU countries also supply foods and beverages to the Dutch market. These foreign suppliers operate with relatively low transportation costs and fast delivery times. Also, their products are not subject to import duties nor do they face major ingredient or labeling requirements. Therefore, U.S. food products must be highly competitive, and specialty or niche items to sell in the Dutch food market.

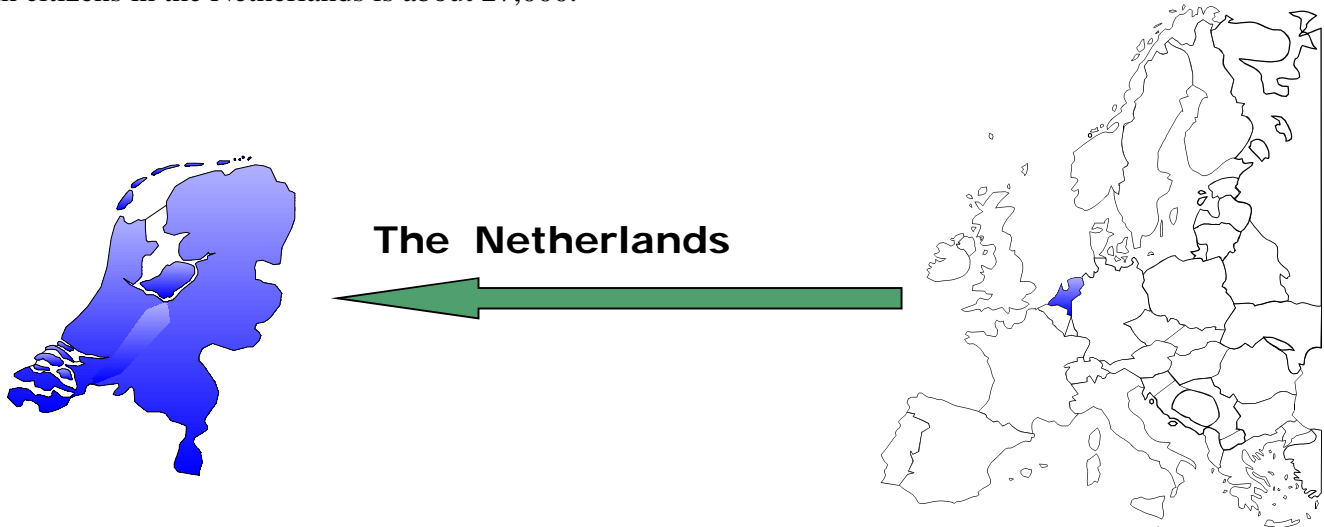
Exchange Rate			
Year	U.S. \$	Euro	Dutch Florin (guilder)
1996	1	-	1.68
1997	1	-	1.95
1998	1	-	1.98
1999	1	0.94	2.07
2000	1	1.09	2.39
2001*	1	1.14	2.45

*Note: Exchange rate for the first six months

Section I. Market Summary

Demographic Characteristics

The Netherlands is the most densely populated country in the world, with a population of 16.0 million consumers. The Netherlands has 971 inhabitants per square mile (468 people per square kilometer) as compared to 860 in Japan and 75 in the United States. The Netherlands is about the size of the state of Maryland which has about 502 inhabitants per square mile. More than half of the population lives in the urban "Randstad" area within the triangle of Amsterdam, Rotterdam and Utrecht. About 5 percent of the Dutch population is non-Dutch. Turks and Moroccans account for the largest single ethnic groups. The number of American citizens in the Netherlands is about 27,000.



According to AC Nielsen, the most important demographic trends in the Netherlands are:

- Population will grow from 15.9 million in 2000 to 17.5 million in 2020.
- The number of households will increase from 6.9 million in 2000 to 7.9 million in 2020.
- The percentage of one person households will rise from 27.5 in 2000 to 37.0 in 2020.
- The percentage of people over 60 years old will grow from 18.2 in 2000 to 24.7 in 2020.
- The number of immigrants from non-western countries will expand from 1.6 million in 2000 to 2.3 million in 2015.

Economic Development

After several years of sustained non-inflationary growth and low unemployment, the Dutch economy has deteriorated markedly. Real GDP growth, which already decelerated before the September attacks, is expected to weaken further and fall to just 1.0 percent in 2001, from a robust 3.5 percent GDP growth in 2000. While the cyclical turnaround has essentially been export led, acceleration of the downturn also reflects a weakening of private consumption and business fixed asset investment. Lower world trade growth and deterioration of the Dutch competitive position are forecast to yield sharply lower real export growth in 2001 (up 3.5 percent from 10.8 percent in 2000), while the abrupt slowdown of the U.S. economy, slumping stock markets, and large layoffs will result a drop in household and business confidence. The latter will lead consumer spending in 2001 to decelerate further (up 1.2 percent from 3.8 percent in 2000), while putting a damper on business fixed asset investment (up less than one percent from 5.4 percent in 2000). CPI inflation peaked at 5.2 percent in August, the highest inflation rate in the Euro area. The current slowdown of the economy is still not fully reflected in labor market conditions, and thanks chiefly to strong job growth.

The Netherlands: Economic Development					
	1998	1999	2000	*2000	*2002
Gross Domestic Product (%)	3.70	3.70	3.50	1.00	1.50
Unemployment (%)	4.90	4.00	3.60	3.25	3.75
Consumer price inflation (%)	2.00	2.20	2.60	4.50	2.50
Average buying power (%)	1.40	-0.10	0.40	6.75	1.25
Total private consumption (%)	4.10	4.50	3.80	1.20	3.50
Private consumption of food and beverages (%)	0.20	1.20	1.20	1.00	1.50

Source: Bureau For Economic Policy Analysis (CPB) and 2001 Annual Review The Netherlands (OECD)

* Estimated

OECD projections anticipate the Dutch economy to progressively stabilize and show hesitant recovery beginning only in the second half of 2002. The OECD projects GDP growth to barely edge up to 1.5 percent in 2002, while rising to around 2.6 percent in 2003. With oil prices falling, and the impact of the foot and mouth disease out of the way, CPI inflation is expected to soften significantly to average 2.5 percent in 2002. The labor market remains tight also in 2002, and the sharp slowdown of the economy is expected to reverse a trend of declining unemployment and lead the number of jobless to edge up slightly.

Despite a sizable boost to disposable incomes brought about by a major income tax reform introduced in early 2001, weakening of private consumption in early 2001 has persisted during the first three quarters of 2001. Household spending behavior seems to have been greatly affected by a sharp fall in confidence to the lowest level in five years. Private consumption has also been hampered by a decline in the ratio between household wealth and disposable incomes reflecting slumping share prices and leveling off of real asset prices. Borrowing to finance consumption has also become more expensive for households since interest payments on consumer credit are no longer tax deductible. Overall, real private consumption growth is expected to fall from 3.8 percent in 2000 to just 1.2 percent in 2001. While spending on durable goods is expected to stagnate, consumer spending on food and beverages in 2001 will be up 1 percent.

The Netherlands: Forecast of Total Spending on Food and Beverages			
	2001	2002	2005
Total Consumer Spending	US\$ 188.7 billion	US\$ 199.0 billion	US\$ 231.8 billion
Total Spending on Food and Beverages	US\$ 31.7 billion	US\$ 32.5 billion	US\$ 36.2 billion
Share of Food and Beverages in Total Consumer Spending	16.8 %	16.5 %	15.7 %

Source: AC Nielsen, 2001

Of total private consumption, 17.1 percent (US\$ 30.9 billion) was spent on food and beverages in 2000. In the next couple of years, total expenditures on food and beverages should continue to fall as a proportion of total spending. According to AC Nielsen, total sales of food and beverages is expected to increase slightly to US\$ 31.7 billion in 2001. A slight growth is also foreseen for 2002. In 2000, Dutch households spent US\$ 69.5 on food per week, of which US\$ 53.1 was spent in supermarkets. Large supermarkets have about 65 percent share of the market, while specialty stores, open air markets, department stores, convenience stores in gas stations, etc., make up the balance.

The Netherlands: Consumer Buying Characteristics				
	1997	1998	1999	2000
Population Size	15.6 mln	15.7 mln.	15.8 mln.	15.9 mln.
Number of Households	6.7 mln.	6.7 mln.	6.8 mln.	6.9 mln
Household Size	2.3	2.3	2.3	2.3
Total Consumer Spending*	US\$ 186.2 bln	US\$ 194.0 bln	US\$ 196.6 bln	US\$ 180.6 bln
Total Spending on Food and Beverages*	US\$ 33.9 bln	US\$ 34.3 bln	US\$ 34.2 bln	US\$ 30.9 bln
Share of Food and Beverages in Total Consumer Spending	18.2%	17.7%	17.4%	17.1%
Spending per Week/household	US\$ 97.95	US\$ 99.00	US\$ 96.18	US\$ 84.10
Spending per Week/household on Food	n.a.	n.a.	US\$ 79.23	US\$ 69.46
Spending in Supermarkets per Week/household	US\$ 61.54	US\$ 63.64	US\$ 62.80	US\$ 53.14
Number of Supermarket Visits per Week	3.1	3.0	3.1	3.1
Supermarket Spending per Visit	US\$ 20.00	US\$ 21.21	US\$ 20.29	n.a.
Number of Different Supermarkets Visited per Week	1.8	1.8	1.8	1.8
Average supermarket sales per m ² floor area	US\$ 6,835	US\$ 7,024	US\$ 6,686	US\$ 6,138

Source: CBL, 2001

* Source: AC Nielsen, 2001

In 2001, supermarket prices have increased, especially for potatoes, vegetables and dairy products. This increase is partly due to the rise of the Value Added Tax on food. It is expected that the introduction of the Euro currency will further increase food prices, since the new euro prices will be round off upwards. In addition, part of the transition costs will be passed on to consumers.

Transition to Euro Currency

Dutch retailers are expected to make the transition from the Dutch Guilder to the Euro for the customer as smooth as possible. During the first four weeks of 2002, there will be two legal national currencies in the Netherlands: the Guilder and the Euro. Customers will pay in guilders and receive change in euros. To avoid chaotic situations and queues at the check-outs, a sufficient supply of euros should be available for the consumer before the first of January 2002.

Dutch Food Purchasing Attributes

According to the Dutch Food Retail Association CBL, consumers prefer to shop in supermarkets. More than 4 million consumers shop daily in the 5,100 Dutch supermarkets. In 2000, total supermarket sales amounted to US\$ 19.9 billion. Since consumers prefer one-stop shopping, supermarkets expand their services and assortments with non-food products such as personal computers, crockery, textiles, books, CD's, and services such as photo development and shoe repair. In 2000, sales of these articles and services was US\$ 888.7 million. At the moment, non-food products have a 5 percent share of total supermarket sales. A rapid increase by 25 percent per year is expected. In 2001, one major supermarket chain replaced more than 1,000 food products with higher margin non-food products.

As a result of changing demographics and increased wealth, Dutch eating habits are changing. Consumers are demanding convenience products such as ready-to-eat-meals, prepacked fresh foods, more variety, and more specialty food items. For the modern consumer, product quality is as important as taste and health characteristics. Also, sustainability, environmental and animal welfare play an increasingly important role in marketing and consumer relations. In addition, consumer interest in organic food, functional food, Kosher food, Halal food, and private labels is growing, albeit slowly. In 2000, sales increases occurred in ready-to-eat meals, organic food and meat substitutes. Sales increases were also recorded for non-food and fresh foods. The fresh produce departments are still gaining in importance for supermarkets. At the moment, the fresh produce departments account for almost the half of total supermarket sales (US\$ 9.5 billion).

A Brief Description of the Dutch Consumer	
The Consumer in the Drivers Seat:	internet, large amount of choices, price-sensitive
Multi-channel:	increasing distribution channels food, 24-hour economy, catering
Food-trends:	health, functional food, snacks, convenience foods, nutritional awareness, increase of fresh products
Brands in the Future:	pillars of trust, confidence

Source: NFO Trendbox, 2000

Current consumer trends are:

- Most consumers (53 percent) visit the supermarket by car, 29 percent use the bicycle and 18 percent of consumers go by foot. On average, traveling time to the supermarket is about nine minutes.
- More than 80 percent of the Dutch, especially younger people, are confident that the food supply in the Netherlands is safe. They also believe that the supermarket is a place where safe food is sold, compared to 45 percent in other Western European countries. A sizeable group has serious doubts regarding food safety for specific sectors. Most of the concerns are regarding the safety of convenience foods, meat and delicatessen, chicken, eggs and GMO foods. About 20 percent of the population no longer trust the information that is released about health risks, quality and origin of meat, due to the recent meat crises (BSE, FMD, Swine fever etc.). More than 60 percent of the Dutch think that Dutch food products are safer than foreign products. In general, Dutch consumers have very limited knowledge of food production. Survey responses indicate that one-third of the Dutch population is willing to pay a higher price for food which is guaranteed safe.

- Good quality is rated as the most important reason for choosing a supermarket, followed by a pleasant shopping atmosphere. Low prices are rated sixth. Supermarkets offer weekly specials for owners of client cards. Almost 80 percent of all consumers have a client card for at least one supermarket.
- Supermarkets have the highest market share for all fresh food products. The number of consumers who buy their fresh food products prepackaged is rapidly increasing. The trend toward prepacked fresh food products is irreversible, with the demand for convenience playing an important role. Young households with children buy prepacked fresh food more often than other households.
- Consumer preference for branded products has generally increased or remained stable. The highest increase in preference for branded products is in pet food, and coffee. Consumers appreciate private label products most because they offer good quality for attractive prices. Therefore, price conscious consumers favor private label products. In 2000, private label products volume decreased by 0.1 percent to a 20.5 percent of the market, but increased 0.2 percent in value to an 18.6 market share.
- In an increasing number of households less time, or very little time, is spent on preparing meals. This is partly due to the rise of one person households. In more than one out of ten households, warm meals are often or always consumed out of the home. The percentage of consumers that eat ready-to-eat meals has increased from 19 percent in 1995 to 25 percent in 2000. Main reasons to choose ready-to-eat meals are lack of time to cook. Particularly on weekends less meals are cooked at home. Almost 75 percent of Dutch households own a microwave oven, compared to 49 percent in 1995. It is expected that the convenience market will increase by 50 percent to US\$ 1.2 billion in 2005.
- Customers are seeking a wider product range and better service. In particular younger consumers like to be surprised with new products in the supermarket. Almost 70 percent of all households like finding new products in the supermarket and 45 percent indicate that cooking demonstrations and tasting new products make shopping more fun. Sales of medicines in a supermarket drugstore-department are greatly appreciated by customers. More and more Dutch consumers decide what they want to purchase during their supermarket visit rather than using shopping lists.
- The demographic make-up of the Dutch population is changing rapidly. Although the Netherlands still has a relatively young population, the growth-rate of the older generation is accelerating. This is due to falling birth rates and rising life expectancy. Within 20 years, one out of five people will be over 65 years old. Therefore, a sharp rise can be expected in sales of food products that prevent age-related diseases. Consequently, functional foods and nutraceuticals may fulfill an increasingly important role in the average diet. However, potential barriers to this growth include regulations, confusion over the meaning of the term "functional food", complicated health information and the negative perception of GMO's in food. In the Netherlands, the leading segment in functional foods is dairy. In 1999, the sales of dairy products with health claims amounted to US\$ 165.1 million. Total sales of functional dairy foods has been increasing by 20 percent per year.
- Product quality exceeds being tasteful and healthy. Sustainability, environmental and animal care play an increasingly important role. In addition, people get more attached to durable and socially responsible production methods as they age. Therefore, the rise of elderly people in the Netherlands will increase consumer interest in production methods and the origin of products (tracing & tracking). As a result, the demand for organic foods may grow, although many believe that organic products are expensive. On average, organic foods are regarded as healthier. Total Dutch sales of organic foods are estimated to be US\$ 293 million in 2001. Supermarkets account for 45 percent of total organic food

sales and their market share is increasing.

- About 1.5 million Muslims live in the Netherlands. Many are from Turkey and Morocco. In 2001, this group will spend about US\$ 2.4 billion on food and beverages, partly on Halal food. Approximately US\$ 0.6 billion of the total is spent in Dutch supermarkets. Because of their expected population growth, the demand for Halal food and Kosher food is increasing. Non-Jewish consumers, like Muslims, vegetarians, and consumers intolerant to lactose, represent 40 to 50 percent of the consumers of Kosher food. The same can be said about Halal food. Non-Muslim and non-Jewish consumers believe that Halal and Kosher food are very pure. In addition, because of its traceability consumers have the feeling that the food is very safe to consume.
- About 70 percent of the population states in surveys that they are concerned about genetically modified organisms (GMO's) in food. But still, GMO's are generally less of an issue with the consumer than with food producers, importer/wholesalers and retailers. Consumer organizations usually have a balanced opinion, while environment groups are against the use of GMO's in food. Producers and retailers are sometimes targeted by anti GMO pressure groups and therefore fear consumer scares and consequent loss of market share. Therefore, the use of GMO ingredients in food products is decreasing. If more than 1 percent of GMO's are used in food, EU regulations specify that it is clearly specified on the label.
- The Dutch consumer is spending more and more money on food, mainly due to increasing out-of-home consumption. Total sales of the Dutch hotel, restaurant and institution sector is increasing twice as fast as total supermarket sales. Sales of snacks and desserts in company cafeterias are increasing rapidly. Consequently, the hotel, restaurant and institution sector has become the biggest competitor to Dutch supermarkets. In 1999, total food sales of the Dutch hotel, restaurant and institution sector grew by 7 percent to US\$ 4.6 billion. Convenience shops in gas station are another threat to the supermarket industry. In 1999, total food sales at gas stations increased 15 percent to US\$ 0.8 billion. It is expected that total food sales at gas stations will grow to US\$ 1.3 billion in 2005. The sales of soft drinks, sport drinks, prepacked sandwiches and dairy drinks show the strongest growth. Shell and BP have combined a market share of 50 percent, while Total, Fina and Esso account for 40 percent.

Trends in the Dutch Food Market	
Health	natural ingredients - low calories - no sugar - fresh - organic
Convenience	frozen foods - fresh, prepacked - take-away - easy to prepare
Price	special offers - shop-around
Winners	fish - meals - petfood
Distribution	more power to the supermarket - fewer specialty stores - more shopping at the gas and railway station
Stores	more personal service - wider assortment - more fresh and non-food - convenience foods - more exotic products - environmental friendly products

Opportunities for U.S. Products

U.S. food products must be highly competitive or differentiated to sell in the Dutch food market. At the

moment, the main trade barriers for U.S. food products are high freight costs, and in particular the high US dollar. However, some continue to be successful (see Annex: 1.).

Advantages	Challenges
Sophisticated market, good buying power	Markets are saturated, competition is fierce
Well organized trading system, many speak English	Transportation costs, import duties
Favorable image of American products	Label & ingredient requirements
Strong interest with buyers in unique and innovative products	Difficult to attract the attention of the large food buying organizations

Food Safety Policy

The Netherlands Food Authority

The Netherlands Food Authority (NVA), which is currently being set up, will be responsible for communicating information regarding food and production methods, as well as conducting research and carry out quality checks. Deliberations are still going on as to the final structure and authority of the NVA. The NVA will attempt to integrate the food safety-related regulatory functions previously performed separately by the Ministry of Agriculture (for food production) and Ministry of Health (for post-production food safety). In October 2001, the Dutch Cabinet decided that the NVA will continue to report to both the Health and Agriculture Ministers. Therefore, both Ministers will keep their responsibility regarding to food safety issues. The NVA itself may evaluate quality control organizations, but will mainly play an advisory role. According to the Dutch food retail industry, however, it is crucial for the NVA to operate independently of politics, similar to the U.S. Food and Drug Administration. They state that without the power to define its own policy, the Netherlands Food Authority can never actually become an authoritative body.

Dutch Commodities Act

In general, The Netherlands follows EU policies regarding labeling and ingredient requirements. The Dutch *Commodities Act* (Warenwet) provides general guidelines and requirements for foods. The basic objectives of this law are health protection, product safety and labeling. Besides the Dutch Commodities Act, general aspects of some primary foods are regulated by two other laws: the *Agricultural Quality Act* (Landbouwkwaliteitswet) and the *Meat Inspection Act* (Vleeskeuringswet).

The Agricultural Quality Act concerns primary agricultural products, while the Meat Inspection Act concerns slaughterhouses. These three Acts are basic laws and provide a basis for setting standards but do not specify particular standards themselves. Standards concerning specific products or subjects (e.g. labeling and hygienic production) are the domain of individual implementing decrees (Royal decrees), based on the Commodities Act or one of the two other Acts mentioned above.

Improved GMO Labeling

At the moment, Dutch consumers are reportedly not satisfied with information about GMO ingredients on food packaging. According to the Dutch Food Retail Association (CBL), current labeling is insufficient and labeling requirements should be made more stringent. Detection of genetically modified ingredients should no longer be the basis for labeling, since the detection methods are not covering all the ingredients. All ingredients processed at any stage of production should be included.

Voluntary Functional Foods Code

The Dutch Nutrition Center (Voedingscentrum) currently regulates a voluntary code for functional food health claims, while the Control Board for the Recommendation of Functional Foods (Keuringsraad Aanprijzing Gezondheidsproducten) checks label and advertising claims on about 1,000 health products per year. At the moment, only a small number of manufacturers conform to the Nutrition Center's code, which is widely regarded as too strict to be practical.

CBL-BRC-code

In 2001, CBL launched the Dutch version of the British Retail Consortium (BRC) code, a food safety standard for companies supplying private labels to supermarket chains. In addition to hygiene, the CBL-BRC-code also pays attention to quality and the production process. After the United Kingdom, The Netherlands is the second country in Europe with such a code. It is expected that other EU member-countries will follow. Currently, every food retail organization in the Netherlands has its own control standard for food and beverages.

EUREP-GAP

As a consequence of BSE, FMD, Swine Fever and other widely publicized food safety problems, 22 leading European food retailers have recently launched a harmonized third-party certification scheme for their suppliers of fresh produce. Dutch members are the retail organization Ahold/Albert Heijn and the food buying groups Laurus, TSN and Superunie. These four buying organizations control 90 percent of the Dutch food retail market. The 22 food retailers created the Euro Retailer Producer Working Group (EUREP) in 1997. EUREP has worked with producer and certification groups to establish a standard for "Good Agricultural Practices" (GAP) for fresh produce. The final standard was presented at the EUREP-GAP 2001 conference in Bologna, Italy on October 10-12, 2001, along with a list of accredited certifiers. Retailers present at the conference indicated that they have started working with suppliers to ensure their produce is EUREP-GAP certified by 2003 or 2004.

The EUREP-GAP standard is being published as the world's first recognized, harmonized standard for fresh produce production. Retailers, consultants and verification bodies from the agricultural sector all over Europe are involved in the EUREP-GAP process. Until now, total membership has risen to more than 120 organizations. EUREP-GAP standards apply to all agricultural sectors: growers of vegetables and fruit, livestock farmers, and farmers of arable crops. In addition to food safety, EUREP-GAP is also focusing on animal welfare, environmental issues and health conditions for workers.

All food producers/wholesalers which deliver supermarket chain Albert Heijn have to be certified according to the CBL-CBR-code at the end of 2001. In 2002, these food producers/wholesalers have to meet the EUREP-GAP standards. Albert Heijn has announced that these standards will result in full traceability of food products and their ingredients.

Global Food Safety Initiative

In addition to EUREP-GAP, 38 food retailers have created the Global Food Safety Initiative (GFSI), which would address standards throughout the rest of the distribution channel. EUREP-GAP only covers up to the farm gate. GFSI was set up in April 2000 and includes food retailers Ahold/Albert Heijn, Tesco, Sainsbury, Walmart, Carrefour, Casino, Auchan and Metro. Rather than developing its own standard, GFSI will instead provide a set of "key elements" against which other standards can be benchmarked and approved. The finalized benchmark model for food safety standards has to replace the 135 different supplier standards that are now being used worldwide. Implementation of the model would generate considerable cost savings for suppliers. Aiming to speed up reforms to give the appearance of improved food safety in all segments of the distribution channel, retailers are reportedly seeking support from other parties in the sector.

Section II. Road Map for Market Entry

Entry Strategy

- *Due to the concentration of buying power in Europe U.S. exporters will have to consider supplying larger quantities and dealing with fewer buyers. The introduction of the euro currency is likely to facilitate trade. Prices should be more uniform due to the euro and to sophisticated electronic purchasing and distribution systems. To develop ties with European retailers, U.S. firms should use distributors which have a warehouse and/or distribution facility in Europe to handle the small and frequent orders from retailers.*
- *There is fierce price competition among food retailers in order to maintain or enlarge their market share. The Netherlands has a large food production industry and nearby EU countries as Germany, Belgium, France and the U.K. are supplying sophisticated foods and beverages to the Dutch market. These foreign suppliers operate with relatively low transportation costs and their products are not subject to import duties. Therefore, U.S. food product must be highly competitive or differentiated to sell in the Dutch food market.*
- *In Europe, the United States enjoys a positive image, particularly among the younger generation. Although, the American colors (red, white and blue) are a draw and can help marketing and promotional efforts, they may also “color” consumer expectations. American foods do not always enjoy a “fine cooking” or “haute cuisine” reputation. In addition, American manufacturers may face some subtle or implied biases. Europeans are more disposed to buying their own products, believing them to be of higher quality than American foods.*
- *Start testing the Dutch market by sending your product- and price information to importers. Include labels and provide harmonized tariff numbers. Ask importers for their frank opinion on the marketability of your product and, ask if they want to receive samples. Make it easy for them to reply, use a preprinted fax form which they can fill out and fax-return to you. Request a list of importers and available market information from OAA/The Hague. Suggestion: send a copy of your mailing to importers to AgAffairs Office The Hague, enclose your mailing list. Contact info * see Section V.*
- *Consider the range of trade shows and exhibit your product in the most relevant show, like the SIAL in Paris, October 20 - 24, 2002 (even years) or the ANUGA in Cologne, October 11-15, 2003 (odd years). These food shows are the world’s largest of their kind and visited by Dutch and other European food buyers. Also, participate in the U.S. Food Export Showcase (USFES) at the Food Marketing Institute (FMI) Convention in Chicago, May 5 - 7, 2002. The USFES is visited by Dutch and other international buyers. See Annex 2.*
- *Once you have established contact with an interested importer, visit the person and the company and together formulate a plan of action. Be patient, show perseverance and involvement. In the Dutch food retail market, listing fees do not exist. However, a Dutch company usually expects your financial involvement in a promotional plan. Contact your State Department of Agriculture and/or your State International Marketing Office and Trade Association. Seek their assistance and find out if you can participate in the Market Access Program (MAP).*
- *Dutch food retail organizations (like Albert Heijn, Aldi, Lidl) and food buying groups (like Laurus, TSN,*

Superunie) almost never import directly, because of the lower volume of most foreign products. Food retailers and food buying groups often refer U.S. exporters to Dutch specialty food importers. These importers are well equipped to sell to food retailers and food buying groups and are able to introduce U.S. products. A specialty food importer will “test market” your product with retailers. Their negative or positive reply weighs heavily on the importers’ decision to import your product. A U.S. product will be of interest if it is innovative and will produce a profit. Innovation can be the product itself, the packaging or the pricing. Most popular products are those which are new (and therefore have added value), have a higher than average trade margin, and have a professional support plan. See Annex 3.

- Logistics are a very important issue. Dutch supermarket outlets are usually located in the inner cities and difficult to reach by truck. They are supplied daily and often even twice a day. Supermarkets want small stocks, which means frequent and fast delivery to their distribution centers by food producers/wholesalers. The fact that specialty food importers are already supplying products to particular supermarket outlets, makes the logistics much easier.

Success Factors for U.S. Products in the Dutch Market	
Brand	Private Label
' price/quality	' distribution
' emotion	' power of trade
' advertising	' shelf space
' added value promotions	' price/quality
' product-innovations	

Source: ACNielsen, 2000

Market Structure

The Netherlands is a highly developed and competitive market for food. There is fierce price competition between food retailers in order to maintain or enlarge their market share. The Dutch food retail industry is characterized by a high number of supermarkets with a relatively small floor-space. There are only a few “hypermarkets” or superstores. Therefore, the average size of a Dutch supermarket is small compared to those in the U.S. “Large” Dutch supermarkets have about 65 percent of the market, while specialty stores, open air markets, department stores, convenience stores, etc., make up the balance. Increasing competition is met from company cafeterias and 24 hour convenience stores in gas stations. Specialty stores, like butchers, greengrocers, fishmongers, etc., are losing market share to supermarkets because of their lack of economies of scale. The longer opening hours also create problems for the specialty store, which is often operated by family members. Since 1996, most Dutch supermarkets have been open in the evening until 08:00 P.M. In addition, an increasing number of supermarkets are open till 10:00 P.M. About 11 percent of total supermarket sales take place after 06:00 P.M.

The Netherlands: Development of Market Shares in Turnover

	2000		2001		2005	
	Number	Share (%)	Number	Share (%)	Number	Share (%)
Hypermarkets (> 2,500 m ²)	49	5	50	5	60	7
Large Supermarkets (1,000 - 2,500 m ²)	826	36	838	38	1,000	42
Supermarkets (700 - 1,000 m ²)	1,070	28	1,033	27	1,000	26
Small Supermarkets (400 - 700 m ²)	1,286	21	1,194	20	940	18
Small Stores (< 400 m ²)	2,352	10	2,114	10	1,500	7
Total	5,583	100	5,229	100	4,500	100

Source: AC Nielsen, 2001

The Netherlands: Changes in Numbers of Stores per Format				
Store formats	1981	1991	1998	2010
Mobile/driving stores	4,860	3,510	1,131	250
Neighborhood stores < 150 m ²	4,684	2,065	1,209	120
Service supermarkets < 900 m ²	1,871	1,222	1,020	550
Service supermarkets < 2,000 m ²	820	1,303	1,427	1,550
Soft discounters	976	746	643	230
Hard discounters	143	440	638	920
Superstores < 6,000 m ²	28	51	30	55
Hypermarkets > 6,000 m ²	17	9	7	5
Quality discounting	-	-	2	40
Non retail*	3	1	2	4
Multi-cultural immigrant shops	25	45	325	650
Superconvenience shops**	210	510	1,120	1,600
Total	13,637	9,902	7,554	5,974

Source: Cap Gemini Ernst & Young, 2000

* including homeshopping-systems

** including evening shops, petrol shops, railway-shops, camping-shops and excluding delicatessen shops

Relatively new food retailers in the Dutch market are food stores at railway stations/airports, small convenience food stores in the inner cities and 24 hour convenience stores in gas stations. In 2000, total food sales at gas stations increased about 10 percent. To an increasing extent, large retailers supply to, or own many of these convenience outlets. In addition, the wine, liquor, and drug chain-stores are practically all owned by the large food retail organizations and are growing in importance at the expense of privately owned stores in this market sector. Although the market share of Dutch supermarket chains is growing, the classic supermarket is expected to evolve into a combination supermarket/catering service because of:

- a 10 percent annual increase of out-of-home consumption
- an increasing number of restaurants which sell ready-made meals
- upcoming Dining & Meal-shops (something in between restaurant, catering and supermarket)
- tighter cooperation between the food industry and wholesalers/retailers
- use of e-commerce (by the food industry, the wholesalers and the retailers)

The Dutch food retail industry is dominated by Dutch supermarket chains. The only foreign supermarket chains are the German volume discounters Aldi and Lidl. French based Metro is only active in its Makro cash & carry business in the Netherlands.

The Netherlands: Shares in Turnover by Product Segments		
	1999	2000
Grocery	18.8	18.6
Confectionery	18.8	18.9
Drinks	16.4	15.0
Dairy Chilled	28.4	27.6
Frozen	21.5	20.7
Cigarettes	5.0	4.6
Personal Care	15.6	15.1
Household	16.8	16.4

Source: AC Nielsen, 2000

Discounters

In the last couple of years, price has become more important to the Dutch consumer. However, in the Dutch food retail industry, the market share of discounters is still limited. This is mainly due to the relatively low prices of food and beverages in the Netherlands. The market leader in this segment is Aldi (364 outlets) with a two-thirds market share, followed by the discounters Basismarkt (187 outlets) and Lidl (82 outlets). It is clear that the appearance of these discounters has increased the price-consciousness in the Dutch food market. According to AC Nielsen, the market share of discounters in the Dutch food retail industry increased from 7.3 percent in 1994 to 9.4 percent in 2000. The average growth of market share is about 0.4 percent per year.

Ethnic Food Stores

About 1.5 million Muslims live in The Netherlands, many of them are from Turkey and Morocco. In 2001, this group is expected to spend about US\$ 2.4 billion on food and beverages, partly on Halal food. Approximately US\$ 0.6 billion of this is spent in Dutch supermarkets. In 2001, the Dutch Halal Quality Mark Association (SNH) has been founded. SNH's objective is to replace the various Halal marks by one Dutch Halal Quality Mark. Because of the expected population growth of Muslim inhabitants, total sales of this group on (ethnic) food and beverages is expected to increase to US\$ 3.7 billion in 2015. In the last couple of years, an increasing number of ethnic/Turkish supermarkets have been opened in Dutch cities.

The Netherlands: Choice of Food Retail Outlets by Non-Dutch Inhabitants in 2001 (in %)			
Community	Turkish	Moroccan	Surinam/Dutch-Antilles, Aruban
Supermarket	24	7	50
Local shop	5	4	2
Ethnic shop	10	46	2
Open air market	5	7	2
Combination	25	4	23
Dependent per case	31	32	21
Population for 2000	296,000	252,000	351,000
Expected Population for 2015	354,000	333,000	447,000

Source: Distrifood, 2001 & AC Nielsen, 2001

Note: Turks, Moroccans and Surinams together are expected to spend US\$ 306 million on food and beverages in 2001.

Online Shopping

The Netherlands has the 4th highest percentage of population accessing the internet, after the United States, Norway and Denmark. According to GfK, more than 45 percent of the Dutch population over 12 years old has access to internet. The share of people who order food and beverages by internet, however, is lower than 0.5 percent. The share of people who look for certain food products on the internet is about 4 percent. Therefore, internet is mainly seen as a virtual shop-window. In 2001, food sales through internet were less than 0.1 percent share of the total.

The most important motives to use internet are ease of use and to save time. More than half of the customers who shop by internet, prefer direct delivery to their homes. It is expected that fast delivery of the right supply to the right place will become more important in the near future. Because of the high use of the internet in The Netherlands, a rapid growth of online shopping is expected. According to CBL, internet sales of food and beverages will increase to US\$ 1.9 billion by 2010, which will be about 10 percent of total supermarket sales. Albert Heijn currently offers "AH's Home Delivery," the largest service in the Dutch online food market. AH's Home Delivery is available to about 35 percent of all Dutch households. It is expected that online food sales will account for 5 percent of Albert Heijn's total sales by 2010. Most Dutch supermarket chains still lag behind in online activities, compared to other European supermarket chains. On January 1st, 2002, the Dutch Online Shopping Association (Nederlandse Thuiswinkel.org) will introduce an independent quality mark for online shopping internet sites.

Private Labels

In 2000, the market share for private label sales in the Netherlands decreased by 0.1 percent to 20.5 percent in volume, but increased 0.2 percent in value to 18.6 percent. Private labels account for one in five products sold. While neighboring markets have experienced a dramatic expansion of private labels over the last few years, sales in the Netherlands have decreased for the third consecutive year.

According to Erasmus Food Management Institute (EFMI), the market share of private labels in The Netherlands is higher than reported. EFMT notes that not all fresh products are included and that Dutch retailers have invested heavily in private labels for fresh food. EFMI gives three reasons why private labels in fresh produce are increasingly popular with retailers:

- Lower competition by premium name brands
- High gross margins
- More possibilities to establish the retailer's "cachet" to attract consumers

Private Label Market Share by Country (%)						
	Volume			Value		
	1999	2000	Diff.	1999	2000	Diff.
United Kingdom	45.4	44.8	-0.6	43.5	43.1	-0.4
Belgium	34.7	35.9	1.2	26.0	26.6	0.6
Germany	33.2	29.0	-4.2	27.4	22.5	-4.9
France	22.1	23.6	1.5	19.1	20.1	1.0
The Netherlands	20.6	20.5	-0.1	18.4	18.6	0.2

Source: PLMA, 2001

The Netherlands: Gainers in Private Label Market Share in 2000 (in %)			
Volume		Value	
Product	Share	Product	Share
Frozen Meat, Game, Poultry	5.2	Frozen Meat, Game, Poultry	3.9
Beer	4.9	Biscuits/pastry	3.3
Biscuits/pastry	3.3	Frozen Vegetables, Herbs	3.2
Frozen Vegetables, Herbs	2.9	Vinegar	3.2
Vinegar	2.5	Oils	2.8
Frozen Fish	2.2	Canned Fruit	2.2
		Fresh Liver Sausages	1.5

Source: PMLA, 2001

The private label market in The Netherlands is expected to grow, with consumers seeking a wider variety of private label products, higher quality goods and more value for the money. At the moment, the fresh produce departments lead private label performance in the Netherlands. In 2000, delicatessens had the highest value share with 27.7 percent, while dairy posted the greatest volume share with 31.5 percent. In general, private labels compete in particular with lower quality brands. Albert Heijn, with its "AH-Huismerk," label is the overall market leader in private label sales in The Netherlands, with about 2,300 products.

Organics

Worried by a series of food scares, Dutch consumers are increasingly turning to organic food. Sales of organic foods are estimated to be US\$ 293 million in 2001. The total turnover for organic food in natural food shops is estimated at US\$ 147 million. At the moment, there are about 200 natural food stores in The Netherlands. Only 25 stores are larger than 200m². In 2000, there was a big boost in the number of organic food stores, most of them under the name "Natuurwinkel," a franchising system for Dutch natural food shops. However, supermarkets already account for 45 percent of total organic food sales and their market share is still increasing. Like pastry and meat shops, natural food shops will increasingly be affected by the trend of one-stop shopping. However, apart from supermarket chains Albert Heijn, Konmar and Nieuwe Weme, most Dutch supermarkets have not changed their marketing and product mixes to feature more organics. Albert Heijn's "AH Bio" private label organic foods constitutes 78 percent of total retail organic food sales.

According to AC Nielsen, total supermarket sales of organic food products rose 40 percent in 2000. Organic potatoes, vegetables, fruit, milk and buttermilk are the most popular products. Organic food products sell at about a 25 percent premium than conventional products. The main consumers are higher income shoppers. According to Erik Hemmes, independent Dutch retail consultant, the total supermarket turnover in organic food is expected to be US\$ 132 million in 2001, which is about the same as total supermarket sales of magazines. By 2010, organic foods are expected account for 2.4 percent of supermarket sales on average, up from 0.6 in 2001. Supermarkets which actively promote organic products could boost that share to 5 percent of total sales. Within ten years, organic food supermarkets with a floor space of 500-1000m² are predicted to appear in the Netherlands.

The Dutch Food Retail Organization (CBL) is encouraging organic agriculture, which means that organic products get priority in Dutch supermarkets. The Dutch Ministry of Agriculture, Nature Management and Fisheries is also promoting organic agriculture. CBL participates in the Taskforce Organics initiated by the Ministry of Agriculture.

Company Profiles

In 2000, total supermarket sales were US\$ 19.9 billion. The Dutch food retail industry is dominated by the world's 4th largest food retail organization Ahold/Albert Heijn with a market share of 28 percent. Food retailer Ahold/Albert Heijn purchases food for its own Albert Heijn supermarket chain. Because of the relatively small market shares of some Dutch food retailers, many of them are members of large food buying groups to gain mass and synergies. In The Netherlands, food buying groups Laurus (26% market share), TSN (24%) and Superunie (12%) sell to various supermarket chains directly, or through wholesalers. Albert Heijn, Laurus, TSN and Superunie control 90 percent of the Dutch food retail market.

It is expected that in 10 years the majority of Dutch food will be bought by centralized buying offices of large

food retailers or by buying offices of cooperating smaller retailers throughout Europe, like the Swiss-based AMS (Associated Marketing Services AG). This international buying alliance buys for different European food retail organizations, like Ahold (holding company of Albert Heijn), in different countries. In 1996, AMS bought over US\$ 96 billion of food products which were sold under the private label “Euroshopper.” The strategic alliance AMS is just one of the about a dozen European buying alliances for food retailers, although it is one of the largest. The Dutch food buying group, Superunie, is a member of the international buying alliance, Europartners. Ahold is combining its European buying expertise in Ahold European Sourcing (AES).

The Netherlands: Market Shares of the Top Four Supermarket Chains			
	1980	1999	2000
Albert Heijn	13.2	27.7	27.6
C1000	5.2	10.6	11.2
Super de Boer	5.0	9.0	9.1
Edah	6.2	6.9	7.0
Aldi	-	6.3	6.2
Total	29.6	60.5	61.1

Source: AC Nielsen, 2001

The Netherlands: The Six Largest Buying Organizations (Food Retailers and Food Buying Groups) in 2001			
Retailer/Wholesaler - type of outlet	Sales/ Market share	Number of Outlets	Purchasing
Albert Heijn , Food retail organization/food retailer, national multiple	US\$ 5.5 billion 27.6 percent	744 nation wide	Direct, Imp./ wholesaler
Laurus Group , Food buying group for supermarket chains Super De Boer, Edah, Konmar, Spar Convenience, Groenwoudt Supermarkten, Basismarkt and ZHM	US\$ 5.2 billion 26.0 percent	2,418 nation wide	Direct, Imp./ wholesaler
Trade Service Nederland (TSN) , Food buying group for wholesalers Schuitema, A&P Holding and Codis	US\$ 4.7 billion 23.6 percent	871 nation wide and regional	Direct, Imp./ wholesaler
Superunie , Food buying group for 18, usually family owned, regional supermarket chains	US\$ 2.4 billion 11.9 percent	1,948 regional	Direct, Imp./ wholesaler
Aldi , Food retail organization/food retailer, national multiple	US\$ 1.2 billion 6.2 percent	370 nation wide	Direct, Imp./ wholesaler
Koopconsult* , Food buying group for the regional wholesaler Samenwerkende Dirk van den Broek Bedrijven	US\$ 0.7 billion 3.7 percent	176 regional	Direct, Imp./ wholesaler
IN TOTAL	US\$ 19.7 billion 99.0 percent	7,200	Direct, Imp./ wholesaler

Source: AC Nielsen, 2001 and Information Resources, 2001 (*) Note: Supermarket chains could be divided by: national coverage: Albert Heijn and the members of the Laurus Group (like Edah and Super de Boer); regional coverage: members of Superunie; independent supermarkets: who buy through Trade Service Nederland (like C1000) **Buying Procedures**
Usually the purchasing department of a Dutch food retail organization or food buying group is divided into

several units headed by a Unit Manager. Each unit has several Category- or Product Managers who have full profit responsibility. Consequently, managers are careful to purchase products which are profitable. The purchasing departments of the main food buying organizations in the Netherlands are organized as follows:

- **Albert Heijn's** buying department consists of seven separate units, headed by a Unit manager who supervises various Category managers (± 40 in total). Category managers are responsible for one or more products and they handle buying, sales, logistics and all merchandising activities. Category managers have profit-responsibility for their own products.
- **Laurus** buys for member retailers, Super De Boer, Edah, Konmar and the Basismarkt all having nation wide representation. The Central Buying Department of Laurus negotiates and receives offers from food sellers. The Laurus buyers, about 25 in total, present the offers to the buyers of the various member chains.
- **Superunie** has about 25 buyers who buy on behalf of its 18 members. These are mostly family owned, regional supermarket chains. After the central buying department of Superunie accepts the offer of the supplier, the product is offered to all members of Superunie during regularly held buying meetings.
- **Trade Service Nederland (TSN)** buys among others for the wholesale organizations Schuitema and Sperwer. TSN is a fully owned subsidiary of Schuitema. Ahold (holding company of Albert Heijn) owns 73 percent of Schuitema shares. TSN has about 30 Assortment managers/buyers, each responsible for their own products and profits.

Dutch food retailers (like Albert Heijn, Aldi, Lidl) and food buying groups (like Laurus, TSN, Superunie) almost never import directly, because of the lower volume of most foreign products. They often refer U.S. exporters to Dutch specialty food importers. These importers already are well-equipped to introduce U.S. products.

Contact a Dutch specialty food importer or Category- or Product Manager by writing him a short personal letter, and follow up by a telephone call to make an appointment. Before visiting the specialty food importer or Category- or Product Manager, make sure you are informed about the company. In case of a food retailer, like Albert Heijn, visit a few of their stores in advance.

Evaluating Importers

For a U.S. exporter it is important to select a Dutch specialty food importer who has an excellent network of contacts within the Dutch retail industry. In addition, an importer with nationwide distribution gives a U.S. exporter access to many Dutch supermarket outlets along with valuable expertise. In return, a Dutch specialty food importer expects loyalty and promotional support from the U.S. exporter, as well as an exclusive contract for the Netherlands. As a rule of thumb, the specialty food importer expects a margin of 23 to 24 percent of the CIF price, including costs. The supermarkets's margin is generally a minimum of 30 percent. These margins are representative of the specialty foods typically imported from the United States.

For a partial listing of Dutch Specialty food Importers/Wholesalers see Annex: 3.
--

General profile of the Dutch Businessman/woman

These are some generalities often heard about Dutch businessmen or women:

- Practically all speak English.
- They usually have no time for business lunches or dinners.
- After brief introductions, they expect you to come straight to the point. They give you their frank opinion and let you know if you offer them something they don't want.
- Dutch food buyers, the category managers and/or product managers, are fully responsible for the buying process and profits the product will bring. They are only interested to speak to decision makers.
- The Dutch businessman is looking for a relationship, almost a partnership. Once you start doing business with him, he expects continued support from you.
- The Dutch usually know their business and know what your competition is doing. The Dutch businessman understands that you need to make a profit. He is a tough but fair negotiator.

Section III. Competition

The EU produces a large variety of foods at competitive prices. This is partly due to the fact that almost all European firms pay with the euro currency instead of US dollars. Therefore, they do not suffer from the high US dollar rate. At January 1, 2002, the Dutch guilder will be, like the other currencies of EU-member states, replaced by the euro. In addition, EU food producers and exporters have the advantage of relative low transportation cost and fast delivery times. Their product is not charged with import duties nor do they face major ingredient or labeling requirements.

Section IV. Best Products Prospects

The Netherlands: SWOT - Analysis of Product Groups, 2000						
Food category	Strong	Weak	Opportunities	Threats	Change 1999/00 (%)	Sales mln US\$
Groceries					n.a.	n.a.
- Cereals	no	yes	Crunchy Muesli, Variation	saturation	1.5	65.3
- <i>Prepacked Bread</i>	yes	no	Variation		9.0	407.1
- Bread Replacers	yes	no	Roasted Bread, Crackers, Waffles	saturation	+	86.0
- <i>Baking Products</i>	yes	no	Piquant Mixes		11.2	32.8
- Sandwich Filling	no	yes	Variation	saturation	2.8	203.2
- <i>Snacks</i>	yes	no	Cup-a-soup, Noodles, Wrappers, Toasts	health trend	7.7	33.5
- Preserves	no	yes	Canned Tuna in Water, Vegetables	saturation	+	n.a.
- Rice	yes	no	(Int.) Rice Dishes (Paella)		5.6	55.6
- Pasta's	no	yes	Special Dough, Organic	Greek and Spanish dishes, rice, wrappers, saturation	3.4	60.8
Fresh					n.a.	n.a.
- Vegetables and Fruit	no	yes	Small Sized Packages, Organic	grazing	2.0	1,589.7
- <i>Seafood</i>	yes	no	Fish Filets, Quality, Exotic	trend	10.0	161.1
- Meat	no	yes	Poultry, Meat Replacers, Organic	bad catch	3.3	1,482.3
- Dairy	no	yes	Int. Cheeses, Herbs Butter	health trend	0.1	1,336.7
- Bread	yes	no	Sandwiches, Variation, Bake off	saturation	+	308.8
- Eggs	yes	no	Organic	saturation	20.2	119.2
Chilled					n.a.	n.a.
- <i>Ready-to-eat Meals</i>	yes	no	Cook & Steam, Day Fresh		15.1	104.6
- <i>Prepared Vegetables</i>	yes	no	Salad & Dressing, Components		14.0	230.0
- Pizza's	no	yes	American Style, Wood Oven	frozen	-3.0	n.a.
- Sauces	no	yes	Brands	dried	+	9.6
- <i>Juices</i>	yes	no	Mixed Fruit, Breakfast Juices		14.0	71.1
- <i>Rice and Pasta's</i>	yes	no	Components, Quality		23.0	3.9
- <i>Potato Products</i>	yes	no	Potato Pieces & Herbs, Variation	bad crop	6.2	56.8
- <i>Fish Products</i>	yes	no	Mussels	bad catch	11.8	81.0
- <i>Pancakes</i>	yes	no	Variation	frozen	23.0	14.2
- Snacks	yes	no	Sandwiches, Bread	health trend	+	19.2
- Soups	no	yes	Quality	canned	-	2.5
Frozen					4.0	669.5
- Ready-to-eat Meals	no	yes	Components, Quality, Microwave	chilled	-	15.5
- <i>Pizza's</i>	yes	no	American Style, Wood Oven		23.0	79.5
- Potato Products	no	yes	Potato Dishes, Variation	saturation	-4.0	88.4
- <i>Vegetables</i>	yes	no	(Int.) Stir-fry Mixes, Quality	saturation	7.6	53.8
- <i>Fish</i>	yes	no	Fish Dishes	bad catch	6.9	61.4
- Frozen Pastry	no	yes	Quality, Variation	fresh	-0.9	38.2
- Ice Creams	no	yes	Multi Packs, American Style	bad summer	-4.2	141.5
- Meat	yes	no	Poultry Products, Quality		+	17.6
- <i>Snacks</i>	yes	no	Soft Bread, Pistolets, Wrappers, Chicken	health trend	7.4	149.0
			Snacks, Fish Snacks, Microwave			

Snacks & Confectionery					4.7	n.a.
- Biscuits, Cakes, Pastry	yes	no	Children Cakes, Fruit & Grains	saturation	4.6	508.9
- Chocolate	yes	no	Bite Sizes, Dragees, Filled	saturation	4.3	284.1
- <i>Candies</i>	yes	no	Fresh Breath, Dental Care Chewing Gum		6.0	318.0
- Salted Snacks	yes	no	Popcorn, Corn Chips, Light Chips, Multi Packs, Specialty Nuts, Quality	saturation, health trend	+	502.1
Meal Decorators					4.0	512.1
- Taste Makers	yes	no	Italian (Pesto), Eastern, Mexican	"back to basics" trend	+	83.7
- Oils, Vinegar and Acids	yes	no	Olive Oil, Vegetables in Acid		+	83.7
- <i>Sauces and Mixes</i>	yes	no	Barbecue, Gourmet, Fondue, Salad Dressings, Pinch Bottle with Gravy or Bouillon, (Int.) Ready-to-prepare Herbs Mixes, Quality	saturation, bad summer, ready-to-prepare meals	9.0	340.2
Beverages					n.a.	n.a.
- Coffee	no	yes	Instant Coffee, Coffee Pads, Variation	tea	4.4	448.5
- <i>Tea</i>	yes	no	Green Tea, Mate, Variation	saturation	7.5	89.6
- Chocolate Drinks	no	yes			-0.4	51.4
- <i>Premixes</i>	yes	no	Variation	saturation	92.9	14.2
- Beer	no	yes	Fresh & Fruity Tastes (Lemon)		-1.4	594.6
- Wine	yes	no	New World Wines, Quality	premixes	4.4	409.7
- Soft Drinks	yes	no	Ice Tea, Sport Drinks, Light Drinks	premixes	3.3	716.0
- Lemon Cordial	no	yes	Ready-to-drink Packaging	bad summer	0.4	81.8
- Water	no	yes	Less Sparkling, Plain Water		-3.3	n.a.
- <i>Juices</i>	yes	no	Chilled Juices, Breakfast Drinks, Mixed Fruit, Sparkling Juices, Quality		6.1	285.9
Tobacco					n.a.	n.a.
- Cigarettes	yes	no			5.0	617.4
- <i>Cigars</i>	yes	no			11.4	12.2
- Roll-your-own	no	yes	Good Re-closing Packaging	cigarettes	2.0	332.7
Petfood	no	yes		saturation	1.0	203.5
Food Supplements	yes	no	Vitamins and Minerals Together	government regulations	11.5	101.7

Source: Elsevier Food Business Information (Category Food Magazine and Distrifood) and AC Nielsen, 2001

Note: This table should be seen as indicative, since the figures are calculated by different methods by different organizations and, therefor, are not really comparable. The figures deal mainly with supermarkets, which account for about 65 percent of the total Dutch food market.

The Netherlands: Top Food Product Groups, 2000				
Product groups	2000 Sales (in million US\$)	Growth 2000/99 (in million US\$)	Growth 2000/99 (in %)	Share in Total Food Sales
Total Food Sales	19070.6	701.6	3.8	100
1. Potatoes, vegetables and fruit	1,589.7	31.9	2.0	8.3
2. Fresh meat	1,482.3	47.2	3.3	7.8
3. Soft drinks (incl. sport drinks)	716.0	23.0	3.3	3.8
4. Thick liquid milk products	617.6	32.5	5.6	3.2
5. Cigarettes	617.4	29.2	5.0	3.2
6. Dutch cheese	599.0	14.1	2.4	3.1
7. Beer	594.6	-1.4	-0.2	3.1
8. Biscuits and cakes	508.9	22.3	4.6	2.7
9. Milk and buttermilk	449.6	-9.3	-2.0	2.4
10. Coffee	448.5	18.9	4.4	2.4
11. Plain wines	409.7	18.4	4.7	2.1
12. Prepacked bread	407.1	33.5	9.0	2.1
13. Roll-your-own tobacco	332.7	6.6	2.0	1.7
14. Meal decorators	328.2	14.8	4.7	1.7
15. Dry snacks	318.4	18.2	6.1	1.7
16. Yellow fat	316.2	14.1	4.7	1.7
17. Fruit juices, dinks and dairy	285.9	16.4	6.1	1.5
18. Chocolate products	284.1	11.7	4.3	1.5
19. Ready-to-eat meals	234.5	30.8	15.1	1.2
20. Confectionary	230.0	10.4	4.7	1.2
21. Soups	207.8	7.8	3.9	1.1
22. Pet food	203.5	2.0	1.0	1.1
23. Groceries sandwich filling	203.2	5.4	2.8	1.1
24. Foreign cheese	159.4	6.3	4.1	0.8
25. Salads	156.4	9.5	6.4	0.8
26. Frozen snacks	149.0	10.3	7.4	0.8
27. Peanuts and tree nuts	145.7	7.0	5.1	0.8

Source: AC Nielsen, 2001

Note: AC Nielsen's figure of total sales in 2000 (US\$ 19.1 billion) differs considerably from CBL's figure of total sales in 2001 (US\$ 19.9 billion). This difference is probably due to the use of different measurement methods.

The Netherlands: Strongest Growing Food Product Groups (%), 2000				
Product groups	2000 Sales (in mln US\$)	Growth 2000/99 (in mln US\$)	Growth 2000/99 (in %)	Share in Total Food Sales
Total Food Sales	19,071	702	4.0	100
1. Premixes	14.2	6.8	92.9	0.1
2. Frozen meat, game and poultry	17.7	5.4	44.1	0.1
3. Eggs	119.2	20.0	20.2	0.6
4. Ready-to-eat meals	234.5	30.8	15.1	1.2
5. Chilled fish products	81.0	8.5	11.8	0.4
6. Cigars	12.2	1.3	11.4	0.1
7. Baking products	32.8	3.3	11.2	0.2
8. Oils	41.2	3.4	9.0	0.2
9. Prepacked bread	407.1	33.5	9.0	2.1
10. Packed smoked sausage	52.6	4.1	8.6	0.3
11. Chewing gum	59.4	4.5	8.2	0.3
12. Snack bases (toasts)	33.5	2.4	7.7	0.2
13. Frozen vegetables and herbs	53.8	3.8	7.6	0.3
14. Tea	89.6	6.2	7.5	0.5
15. Frozen snacks	149.0	10.3	7.4	0.8
16. Packed dry sausage	45.8	3.1	7.2	0.2

Source: AC Nielsen, 2001

Note: AC Nielsen's figure of total sales in 2000 (US\$ 19.1 billion) differs considerably from CBL's figure of total sales in 2001 (US\$ 19.9 billion). This difference is probably due to the use of different measurement methods.

The Netherlands: Strongest Declining Food Product Groups (%), 2000				
Product groups	2000 Sales (in million US\$)	Growth 2000/99 (in million US\$)	Growth 2000/99 (in %)	Share in Total Food Sales
Total Food Sales	19070.6	701.6	3.8	100
1. Frozen ice creams	141.5	-6.3	-4.2	0.7
2. Frozen potato products	88.4	-3.7	-4.0	0.5
3. Sherry	66.2	-2.3	-3.4	0.3
4. Sugar products	77.3	-1.9	-2.4	0.4
5. Milk and buttermilk	449.6	-9.3	-2.0	2.4
6. Vermouth	16.3	-0.3	-2.0	0.1
7. Sour milk products	122.3	-1.6	-1.3	0.6
8. Frozen cakes	38.2	-0.4	-0.9	0.2
9. Apple sauce	37.6	-0.2	-0.4	0.2
10. Chocolate drinks	51.4	-0.2	-0.4	0.3
11. Beer	594.6	-1.4	-0.2	3.1
12. Lemon cordial	81.8	0.3	0.4	0.4
13. Petfood	203.5	2.0	1.0	1.1
14. Table acids	32.2	0.3	1.0	0.2
15. Cereals	65.3	1.0	1.5	0.3
16. Cakes	52.5	0.9	1.7	0.3
17. Preserved meat	73.0	1.2	1.7	0.4
18. Roll-your-own tobacco	332.7	6.6	2.0	1.7
19. Potatoes, vegetables and fruit	1,589.7	31.9	2.0	8.3
20. Dutch cheese	599.0	14.1	2.4	3.1
21. Packed liver sausage and paste	40.5	1.0	2.6	0.2
22. Preserved fish	37.0	1.0	2.6	0.2

Source: AC Nielsen, 2001

Note: AC Nielsen's figure of total sales in 2000 (US\$ 19.1 billion) differs considerably from CBL's figure of total sales in 2001 (US\$ 19.9 billion). This difference is probably due to the use of different measurement methods.

A. Popular U.S. Food Products in the Dutch Market

- Texmex foods
- Snack foods
- Fruit and vegetables juices
- Processed fruit and vegetables
- Fresh fruit (grapefruit)
- Nuts
- Wine
- Pet food
- Canned salmon

- B. U.S. Food Products not present in significant quantities, but which have good sales potential, include:**
- A variety of grocery items, from peanut butter to Pringle chips, from sport drinks to cheese balls, etc.
 - Red apples
 - Fresh fruit juices
 - American cheeses
 - Organic foods, like organic apples and pears
 - Halal foods
 - Kosher foods
 - Functional foods
 - Ethnic foods
 - Natural food supplements
- C. U.S. Food Products not present because they face significant barriers**
- Canned fruits (high tariffs)
 - Frozen whole turkeys and parts (high tariffs)
 - Fresh pork (high tariffs)
 - Poultry meat (phytosanitary)
 - Fresh beef (phytosanitary)

Section V. Post Contact and Further Information

Post Contact:

Office of Agricultural Affairs (O.A.A.) American Embassy

Postal Address: U.S. Embassy-AGR, Unit 6707, Box 038, APO AE 09715

Visitor Address: Lange Voorhout 102, 2514 EJ The Hague, the Netherlands

Phone: 31-70-3109299,

Fax: 31-70-3657681,

E-mail: agthehague@fas.usda.gov,

Internet: [Http://www.usemb.nl](http://www.usemb.nl)

Further Information:

In general, The Netherlands follows EU policies in regard to labeling and ingredient requirements. The Dutch *Commodities Act* (Warenwet) supplies general guidelines and requirements for foods. The basic objectives of this law are health protection, product safety and labeling. A detailed report which specifically addresses labeling and ingredient requirements in the Dutch market entitled, *The Netherlands: Food and Agricultural Import Regulations & Standards (FAIRS) Report* can be obtained from the FAS homepage:

<http://www.fas.usda.gov>

Annex 1.

U.S. Exports of Consumer-Oriented Products to the Netherlands (US\$ 1,000)					
	1996	1997	1998	1999	2000
Consumer-Oriented Products TOTAL	346,881	351,907	404,676	466,897	461,570
Snack Foods (ex nuts)	6,924	6,068	7,595	8,374	6,908
<i>Breakfast Cereal & Pancake mix</i>	572	547	375	220	689
Red Meats, Fresh/Chilled/Frozen	14,581	15,492	16,284	12,031	6,890
Red Meats, Prepared/Preserved	717	926	1,775	818	568
Poultry Meat	17,542	9,039	1,616	3,869	2,905
<i>Dairy Products</i>	9,941	8,083	11,821	5,938	9,577
<i>Eggs & Products</i>	8,902	5,857	5,318	1,442	2,961
Fresh Fruit	31,429	26,681	24,649	23,684	20,012
Fresh Vegetables	1,843	3,867	2,999	2,681	2,164
Processed Fruit & Vegetables	43,170	40,823	59,314	60,522	46,145
<i>Fruit & Vegetables Juices</i>	32,267	50,816	47,451	58,718	84,815
Tree nuts	96,495	77,111	80,990	67,340	62,476
Wine & Beer	10,598	17,097	47,712	78,905	77,527
Nursery Products & Cut Flowers	37,951	42,851	42,574	42,574	38,963
<i>Pet Food (dog & cat)</i>	13,156	17,610	12,397	16,546	25,005
Other Consumer-Oriented Products	21,115	28,956	42,305	83,234	73,964

Source: BICO

Annex 2.

Food Shows Frequently Visited by Dutch Food Buyers		
Show	When	Show Organizers
HORECAVA , Amsterdam, the Netherlands (Hotel, Restaurant Show)	January 07 - 10, 2002	tel: + (31) 20 575 30 32 fax: + (31) 20 575 30 93 http://www.horecava.nl
ROKA , Utrecht, the Netherlands	March 10 - 13, 2002	tel: + (31) 30 295 59 11 fax: + (31) 30 294 03 79 http://www.rokafoodfair.nl
FMI , Chicago, United States < Participation in U.S. Food Export Showcase tel: + (1) 202 296 9680 fax: + (1) 202 296 9686	May 05 - 07, 2002	tel: + (1) 202 452 8444 fax + (1) 202 429 4559 http://www.fmi.org
World of Private Label (PLMA) , Amsterdam, the Netherlands < U.S. Participation USDA/FAS, Washington Trade Show Office tel: + (1)202 720 3623 fax + (1)202 690 4374	May 28 - 29, 2002	tel: + (31) 20 575 30 32 fax: + (31) 20 575 30 93 http://www.plmainternational.com
SIAL , Paris, France < U.S. Participation: USDA/FAS, Paris, France tel: + (33) 1 431 222 77 fax + (33) 1 431 226 62	October 20 - 24 2002 Bi-Annual Show	tel: + (33) 149 68 54 99 fax: + (33) 147 31 37 75 http://www.sial.fr
ANUGA , Cologne, Germany < U.S. Participation: USDA/FAS/ATO Hamburg, Germany tel: + (49) 40 414 6070 fax: + (49) 40 414 60720	October 11 - 15, 2003	tel: + (49) 221 82 10 fax: + (49) 821 34 10 http://www.koelmesse.de/anuga/english/index.html

Or contact the International Marketing Section of your State Department of Agriculture.

Annex 3.
Partial Listing of Dutch Specialty Food Importers/Wholesalers

American Food Service Gageldijk 1 3602 AG Maarssen	Ph. 030-2613604 fax. 030-2613624	Contact: Mr. G. Chin A. Kwie
BOAS b.v. Stephensonstraat 40 2723 RN Zoetermeer	Ph. 079-3442600 fax. 079-3421722	Contact: Mr. Th. van Ham
Bruce Foods Europe b.v. Klarenanstelerweg 25 6468 EP Kerkrade	Ph. 045-546 5700 fax. 045-546 5777	Contact: Mr. Henk Pelzer
GranFood b.v. Saturnusstraat 43 2516 AE Den Haag	Ph. 070-3815007 fax. 070-3815013	Contact: Mr. Onno Brokke
International Food & Gourmet Products b.v. IFGP De Lasso Zuid 17 2371 EV Roelofarendsveen	Ph: 071-331 6450 fax: 071-331 6440	Contact: Mr. W. de Wit
De Kweker Centrale Groothandelsmarkt S1 1051 KL Amsterdam	Ph. 020-6828866 fax. 020-6827366	Contact: Mr. P.F. Poelstra
Lusto b.v. Vareseweg 115 3047 AT Rotterdam	Ph. 010-4621233 fax. 010-4621270	Contact: Mr. W. Storm Mr. F.M.J.W. Luijk
Pietercil Barends b.v. Bleiswijkseweg 51 2712 PB Zoetermeer	Ph. 079-3441100 fax. 079-3420831	Contact: Mr. J. Hoop Mrs.. R. Andreoli
Sligro b.v. Corridor 11 5466 RB Veghel	Ph. 0413-343500 fax 0413-341520	Contact: Mr. G. van de Ven
Suncomex b.v. Vanadiumweg 15 3812 PX Amersfoort	Ph. 033-4659075 fax 033-4651449	Contact: Mr. B.E. Boerema

Annex 4.

The Netherlands : Buying Association / Supermarket				
Organization	Chain/Supermarket	No. of Outlets	Retail surface in sq. m.*	Location
Albert Heijn				
Albert Heijn B.V. HQ : Zaandam Tel: 31-75-659 9111 Fax: 31-75-631 3030 Internet: www.ah.nl HQ: Zaandam Mother Co. Koninklijke Ahold N.V.	Albert Heijn franchise	506 200	1,127 874	Nation Wide
Primakt HQ:Breda Tel:31-76-579 8888 Fax::31-76-571 6167	Primakt Liquor Stores	24 13	1,350 60	South-Holland, North-Brabant & Limburg
Den Toom HQ:Rotterdam Tel:31-10-433 1777 Fax::31-10-413 5646	Den Toom (incl Liquor Stores)	1	2,300	Rotterdam
Laurus N.V. Tel: 31-73-622 3622 Fax: 31-73-622 3636 Internet: www.laurus.nl HQ: 's-Hertogenbosch				
Basismarkt HQ: Zaltbommel Tel: 31-418-574 444 Fax: 31-418-514 580	Basismarkt	183	450	Nation Wide
Edah HQ: Helmond Tel: 31-492-571 911 Fax: 31-492-571 388 Internet: www.edah.nl	Edah franchise	229 84	900	Nation Wide

Groenwoudt Groep HQ : Renswoude Tel: 31-318-579 911 Fax: 31-318-579 242 Internet: www.groenwoudt.nl www.lekkerenlaag.nl	Groenwoudt Supermarkets	62	1,050	Overijssel, Gelderland, Flevoland, Utrecht, North Brabant, & South-Holland
	Nieuwe Weme Supermarket	36	1,105 m2	Groningen, Friesland Drenthe, Overijssel & Flevoland
	Lekker & Laag	3	1,700	Tilburg & Boxtel
Konmar HQ: The Hague Tel: 31-70-321 5121 Fax: 31-70-329 1174 Internet: www.konmar.nl	Konmar	29	3,500	Nation Wide
Spar Convenience HQ: Zevenbergen Tel: 31-168-357 900 Fax: 31-168-357 999	Spar	275	<500	Nation Wide
	Independent Supermarkets	200	<150	Nation Wide
	Mobile Shops	400	<150	Nation Wide
Super de Boer HQ: Amersfoort Tel: 31-33-454 7777 Fax: 31-33-454 7454	Super de Boer (Incl 260 franchise)	410	825	Nation Wide
ZHM Zuivel Handels-Maatschappij HQ : Oosterwolde Tel: 31-516-568 600 Fax: 31-516-520 691	Mobile shops of The Netherlands	227	25	Nation Wide
	Springer & Partners	91	25	Nation Wide
	Melk & Meer	30	10	Nation Wide
	PRO Markt	39	150	Nation Wide
	Others	79		
Superunie HQ Beesd. Tel : 31-345-686 666 Fax : 31-345-686 600 Internet: www.superuni.nl				
Boni-Markten HQ: Nijkerk Tel: 31-33-247 3131 Fax:: 31-33-247 3141	Boni-Markten	32	750	Overijssel, Gelderland, Utrecht, 't Gooi, Drenthe & Friesland
Boon Sliedrecht HQ : Sliedrecht Tel: 31-184-418 500 Fax: 31-184-412 159 Mother Co. Boon Beheer b.v.	M.C.D.	29	500-1,200	Utrecht, South-Holland North Brabant & Gelderland
	Own Brand & Formula Shops	18	2500	
	Wine & Liquor Store	5		

Coop Nederland HQ : Arnhem Tel: 31-26-384 3900 Fax: 31-26-384 3999	Coop (Including 3 franchises)	55	665	Gelderland, Overijssel, Utrecht & Zaanstreek
Deen Supermarket B.V. HQ : Hoorn Tel: 31-299-252 100 Fax: 31-299-252 102 Internet: www.deen.nl	Deen	26	829	North Holland
Dekamarkt B.V. HQ : Velsen Noord/Beverwijk Tel: 31-251-276 666 Fax: 31-251-276 600	Dekamarkt	62	850-875	North & South Holland and Flevoland
	Wine & Liquor Store	28	83	
	Drug Store Bubbles	4	200	
	Dekamarkt Gas Station	1	60	
Gekoma HQ : Apeldoorn Tel: 31-55-599 8499 Fax: 31-55-599 8490 Email: info@komart.nl Internet: www.komart.com	Komart	16	850	Apeldoorn and surrounding area
	Wine & Liquor Store	6	65	
Van Eerd Food Groep B.V. HQ : Veghel Tel: 31-413-380 200 Fax: 31-413-343 634 Email: van-eerd@van-eerd.nl	Jumbo (incl. franchisers)	52	780	North-Brabant, Limburg, Gelderland & Zeeland
	Pryma (franchise)	17	280	South-Holland, North- Brabant, Zeeland & Limburg
	Others	20		
EM-TÉ Supermarkets HQ : Kaatsheuvel Tel: 31-416-542 500 Fax: 31-416-542 519 Internet: www.em-te.nl	EM-TE Liquor Stores	11	1,015	North Brabant
		11	70	
Hoogvliet B.V. HQ : Alphen a/d Rijn Tel: 31-172-418 218 Fax: 31-172-421 074	Hoogvliet Liquor Stores	31 18	1,000 35	Utrecht, South-Holland & Gelderland
Jan Linders HQ : Nieuw Bergen (L) Tel: 31-485-349 911 Fax: 31-485-342 284 Email: janlinders@janlinders.nl Internet: www.janlinders.nl	Jan Linders	43	690	South East-Gelderland, East Brabant & Limburg
Kluft Distrifood HQ : Beverwijk Tel: 31-251-275 700 Fax: 31-251-226 969	Komart Wine & Liquor Store	25	780	Utrecht & North Holland
		15	71	

Nettorama Distributie B.V. HQ : Oosterhout Tel: 31-162-455 950 Fax: 31-162-456 520	Nettorama Verbruikersmarkten	20	1,125	Overijssel, Utrecht, South-Holland, North-Brabant Drenthe & Limburg
Poiesz Supermarkten B.V. HQ : Sneek Tel: 31-515-428 800 Fax: 31-515-428 801	Poiesz Supermarkt Wine & Liquor Store	33 30	675 30	Friesland, Groningen, Flevoland & Drenthe
Sanders Supermarkt B.V. HQ : Enschede Tel: 31-53-484 8500 Fax: 31-53-484 8501	Sanders	18	610	Enschede and surrounding area
Sligro HQ : Veghel Tel: 31-413-343 500 Fax: 31-413-341 520	Thuismarkt	115	100-350	Nation Wide
	SRV (incl. Springer & Partner/Milk etc.)	150		
	Eigen Formule/Eigen naam	250	100-350	
	Milo	71		
	Drop Inn	40	20-50	
	Snoep Express (candy)	15	100-150	
Prisma Food Retail HQ : Nijkerk Tel: 31-33-245 5455 Fax: 31-33-245 5401 Email: info@primsafood.nl Internet: www.primsafood.nl	Attent	57	203	Nation Wide
	Golff	61	733	
	Meermarkt	82	360	
	Zomermarkt/Rekra	73	231/373	
	Others	39		
Sperwer Holdings HQ : De Bilt Tel: 31-30-221 9211 Fax: 31-30-220 2074 Email: directie@sperwer.nl Internet: www.plusmarkt.nl www.gastrovino.nl	Plusmarkt	128	753	Nation Wide
	Garantmarkt	89	303	
	4=6 Service	12	85	
	Gastrovino (Delicatessen)	43	106	
	Holiday Resorts Shops	14	180	
	Others	20	148	
Vomar Voordeelmarkt HQ : IJmuiden Tel: 31-255-563 700 Fax: 31-255-521 649 Email: Vomar@vomar.nl Internet: www.vomar.nl	Vomar Voordeelmarkt Liquor Store	34 30	1,160	North Holland

<p align="center">Koopconsult working in co-operation with Dirk van den Broek companies HQ Alphen a/d Rijn Tel: 31-172-448 200 Fax: 31-172-474 636 Internet: www.superjob.nl</p>				
Dirk van den Broek HQ: Maarssenbroek Tel: 31-346-581 520 Fax: 31-346-562 550 Email: info@DirkvandenBroek.nl	Dirk van den Broek	36	970	Amsterdam and surrounding area
Bas van der Heijden HQ: Zwijndrecht Tel: 31-78-610 0099 Fax: 31-78-610 1986 Email: info@BasvanderHeijden.nl	Bas van der Heijden	26	934	Rotterdam and surrounding area
Digros HQ: Sassemheim Tel: 31-252-419 003 Fax: 31-252-413 042 Email: info@Digros.nl	Digros	14	98	Leiden and surrounding area
Jan Bruijns Supermarkten Tel: 31-76- 597 3457 Fax: 31-76-597 6505 Email: info@JanBruijns.nl	Jan Bruijns	9	840	Zeeland and North Brabant
	Dino	3	500	The Hague & Katwijk
	Slijterijen Dirk III (Wine & Liquor)	53		
	Drogisterijen Drix (Drug store)	35		
<p align="center">Trade Service Netherlands (TSN)</p>				
Schuitema HQ : Amerfoort Tel: 31-33-453 3600 Fax: 31-33-451 9738 Internet: www.schuitema.nl www.c1000.nl Mother Co. Ahold holds 73%	C1000	388	725	Nation Wide
	Kopak	34	276	
A & P Holding b.v. HQ: Baarn Tel: 31-35-548 3311 Fax: 31-35-541 1751	A & P	123	800	Nation Wide

	A & P Hypermarkets	6	7,600	Arnhem, Ede, Muiden, Venlo, Leeuwarden & Alkmaar
Codis HQ : The Hague Tel: 31-70-359 0390 Fax: 31-70-366 9098 Internet: www.codis.nl	E-markt	84	297	Nation Wide
	Stipt	25	105	
	Thuiswinkel (Mobile Shop)	7	20	
	Volumemarkt	44	540	
	Others	160		
Aldi				
Aldi Holding HQ : Culemborg Tel: 31-345-472 911 Fax: 31-345-419 383 Internet: www.aldi.nl Mother Co. Aldi-Gruppe	Aldi	370	450	Nation Wide
	Per Districts			
	Best	85		
	Culemborg	53		
	Drachten	52		
	Ommen	72		
	Roosendaal	51		
	Zaandam	57		
Lidl				
Lidl Netherlands HQ : Huizen Tel: 31-35-524 2411 Fax: 31-35-526 4139 Mother Co. Lidl Stiftung & Co.KG	Lidl	83	700	
Van Tol				
Levensmiddelen Groothandlen Van Tol B.V. HQ : Bodegraven Tel: 31-172-619 311 Fax: 31-172-613 796 Email: info@tolfood.com Internet: www.tolfood.com	Troefmarkt	86	140	Nation Wide
	Emha			
	mobile shops	235	<100	
	neighbourhood shops	89		
	recreational shops	48		
	Vers Garant	5	80	
Versunie	1,011	< 400		
	Export	97		